Link to article: https://discover.claromentis.com/knowledgebase/articles/753/troubleshooting-infocapture-notifications



InfoCapture notifications are a really important part of the workflow and configuration of InfoCapture forms, it can be frustrating if they are not appearing to work in the way you were expecting.

In this article, we are going to cover tips and tricks for locating or understanding why notifications are missing and also why unexpected notifications may have arrived.

Locating the cause of a missing notification

1- Verification that the notification did or did not send

If you are running Claromentis 8.8.9+, we added additional tracking for InfoCapture notifications within the audit log.

Admin > Audit log > View logs:

Clarom Admin / Audit / V Usa C	/iew logs	from 19-08-	2020	 ✓ All items ✓ All items View issue Add issue Edit issue Change issue assign Change issue status Delete issue Attach file to issue Add note to issue Add new project Update project properties Add new version of form Delete version of form Change form value Change form permissions
CSV d	elimiter () (Vi	Comma (,) O Se ew Impersonated	micolon (:) IP addres	Modify form status Create form status Modify field condition set Modify field conditions Create field condition set Delete field condition set Add field aroup
Date/Time	User name	user	Proxy IP	Delete field group
17-07-2020 01:20	Claromentis Administrator		31.22.42.	Modify field group Modify field permissions Delete form status Reorder form statuses
17-07-2020 01:20	Claromentis Administrator		31.22.42.	Import Issue Create trigger Modify trigger Delete trigger
17-07-2020 01:20	Claromentis Administrator		31.22.42.	Create workflow Modify workflow Delete workflow Re-order SLA
17-07-2020 01:20	Claromentis Administrator		31.22.42.	Edit traffic light Create traffic light Delete traffic light Modify SLA rules
17-07-2020 01:20	Claromentis Administrator		31.22.42.	Modify SLA status actions Modify SLA working hours Modify rules for automatic changes Modify notification template
17-07-2020 01:20	Claromentis Administrator		31.22.42.	Modify notification settings Modify ticket list fields Send an email notification Send an in-system notification

If you can locate a submitted ticket which you would have expected to produce a notification, you will need to cross-reference the time the notification should have triggered with the time range selected in the audit.

If the notification did send but was not received it means:

- Your form is functioning correctly
- The email left the system but did not (for some reason) reach the inbox of the user
 - Was the email address correct / could the email be in spam or junk
 - If we host your site, you can submit a support ticket and we will check the SMTP server to see if the email has bounced or is blocked for any reason
 - If you are self-hosted (on-premise) you may wish to check your SMTP server to trace why this email did not reach the inbox

If you do not have access to the additional audit tracking you may need to check the SMTP setting to see if there were any blocked messages or it could mean there is something wrong with the form.

2 - Is the form correct

If the notification did not appear in the audit tool at all - it means the form is not configured correctly.

In this scenario the customer support team did not get a notification that a new ticket was submitted, it is best to work backwards from the notification itself. When looking at the notification configuration these are the two key questions:

Statuses	Advanced notifications				
Conditions	Configure email notification to inform us	sers about changes in the tickets.			
□ Field condition sets	This is dependent on Triggers having Field page, to define the content of yo	first been added. The second action mus our email notifications when they send.	t be to either create a Notification Templ	ate or visit the Default Notificatio	ns X
1/1 Triggers		ti s i i s d e project reles individu	Does th	is role have	
Behaviour	New Is this trigger	Correct? Foject roles, individe	vers', with a r permissions	to view tickets	?
🗔 Field visibility	+ Add new rule			Ĩ	
E SLA	Trigger	Notification type	Notification template	Send notifications to	
🔀 Automatic changes	New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	↓ <u></u>
Workflow	New issue reported	Email	Issue reported: Development	Development	↑ ↓ 面
Notification	Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓ 亩
Notifications	Status changed	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ ↓ 亩
Default notification fields	Note added	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ 亩
List options					

1 - Is the trigger correct?

If we check back to the trigger configuration, it all seems correct:

+ Add new trigger					
Name / Order #	Rules	Use for dynamic fields changes	Use for notifications	Notification type	
= New issue reported	New ticket submitted	Yes	Yes	Email	<u>ش</u>
= Status changed	Any of these fields changed: (STATUS)	Yes	Yes	Email	ā
= Note added	Public or private note has been added	Yes	Yes	Email	İ
= File upload	File has been uploaded	Yes	Yes	Email	İ
= Assigned changed	Any of these fields changed: (ASSIGNED TO)	Yes	Yes	Email	İ

Admin / Infocapture	e / Bug Tra	cker / Triggers / Add/Edit a trigger	*
Trigger propertie	S Name	New issue reported	
	Rules	Name	Value
		Ticket activity	 New ticket submitted Public or private note has been added Public note has been added Private note has been added File uploaded
		Any of the following fields changed	Type (type) Reproducibility (reproducibility) Severity (severity) Priority (priority)

If this trigger is based on a field condition set, this will also need checking. You will then need to ensure every condition that was identified within the field condition set was definitely met when the user submitted the ticket.

2- Does this role have permissions to view tickets?

When a specific role is entered into the notification configuration (rather than a direct email for example) the system will run a check to ensure that role has permissions to view tickets. As notifications often contain ticket details, it would be a permissions loophole if roles placed here could get notifications

Checking the permissions, we can see the 'Customer support' role is missing this permission:

L Project roles Project soles	🔅 Options	∦ All					
				F	Project role		
Rights	Admin	Development	Testing	Users	Customer support	Submitter of ticket	Ticket handler
View tickets							
Update tickets					<	<	
Submit tickets					<		
Handle tickets					~		
Update tickets status					~		
Assign tickets					Z		
View notes					<	•	
Add notes to a ticket					<		
View attached files					Z		
Attach files to a ticket					<		
View history of tickets					~		
Manage tickets (delete, files, notes)	2				2	<	
View reports page					<		
View statistics page					<		

Locating the cause of an unexpected notification

If you have a notification arrive which you do not see configured in the notification panel, this could indicate one of the following scenarios.

1- If the recipient of the notification was either the ticket submitter or ticket handler - are either of these boxes ticked:

Admin / Infocapture / Bug Tr	racker / Notifications				*
Project options	Notifications				
A Project Summary	Configure email notification to inform us	ers about changes in the tickets.			
 Following to at 	Notify submitter about any changes i	n the tickets			
properties	Notify ticket handler about any change	ges in the tickets			
 Project permissions 	Save				
Statuses	Advanced notifications				
Conditions	Configure email notification to inform us	ers about changes in the tickets.			
□ Field condition sets	This is dependent on Triggers having Field page, to define the content of yo	first been added. The second action mus	st be to either create a Notification Templa	ate or visit the Default Notification	ns X
1/1 Triggers					
Behaviour	For a chosen Trigger, an email notifica 'New Ticket Submitted' could generat	ition can be sent to project roles, individu e an email to a project role called 'Appro	aal email addresses, or user pickers on yo vers', with a notification template asking	ur form. For example, a trigger of the role's users to approve the tic	ket.
🗔 Field visibility	+ Add new rule				
E SLA	Trigger	Notification type	Notification template	Send notifications to	
🔀 Automatic changes	New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	+ 🖮
I≁ Workflow	New issue reported	Email	Issue reported: Development	Development	↑ ↓
Notification	Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓ <u> </u> <u> </u>
- N		F 3		<u></u>	

Having either of these ticked will result in the handler or submitter receiving a default notification. If you wish to customise the default notification, here is some guidance.

2 - A second place to look (if the above are not checked) is in the front end of the InfoCapture in the ticket list view. You will need to ask the user who is getting these notifications to check whether any of these settings are checked:

InfoCapture /	Demo Form		Ticket # Jump	م سل sw	ritch to Demo Form	~ *
				+ Sub	omit ticket 🔳 🎿	∠ ♦ »
This project is in '	"testing" state. Notifications will not be sent.					7
Enter y	/our search words	Search	Statistics		Options	
·			All	11	+ Submit ticket	
			Submitted by me	11	List of tickets	
			Assigned to me	0	🛃 Statistics	
1-11/11						
IC	D •			é	3	
de	lemo0011		1	2		
de	lemo0010		2	2	. /	
d	lemo0009				/	
InfoCapture /	Demo Form / Notifications settings		Ticket # Jump	с щ sw	ritch to Demo Form	~ *
				+ Sub	omit ticket 🔳 🎿	₹ ⇒
	Please notify me about any chang	ges in tickets which are				
	Submitted by me	◉ Default ○ Yes ○ No				
	Assigned to me	● Default ○ Yes ○ No				
		Any new tickets				
		Save				

3- You will need to ensure that the users are definitely not included in any of the roles that are due to get notifications, a way of checking this is by reviewing the template of the notification. If you know the subject line of the email is 'A new Bug issue reported....' you can check who is in line to receive this notification, in the example below:

Trigger	Notification type	Notification template	Send notifications to		
inggei	Notification type	Nouncation template	Send notifications to		
New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	+ 🛅	
New issue reported	Email	Issue reported: Development	Development	++亩	
Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ + 亩	
Status changed	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ ↓ 亩	
Note added	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ m	
					You would then ne
lotifications templates + Add new template					You would then ne
otifications templates + Add new template Name	Subject line		Туре		You would then ne
otifications templates + Add new template Name Issue reported: Reporter	Subject line Bug {issue:_id_in_project_} has bee	en reported: {issue:summary}	Type HTML	â	You would then ne
otifications templates + Add new template Name ssue reported: Reporter ssue updated: Reporter & Handler	Subject line Bug {issue:_id_in_project_} has been Bug {issue:_id_in_project_} has been	en reported: {issue:summary} en updated: {issue:summary}	Type HTML HTML	â	You would then ne
Add new templates Add new template Name ssue reported: Reporter ssue updated: Reporter & Handler ssue reported: Development	Subject line Bug {issue:_id_in_project_} has bee Bug {issue:_id_in_project_} has bee A new Bug {issue:_id_in_project_}	en reported: {issue:summary} en updated: {issue:summary} has been reported : {issue:summary}	Type HTML HTML HTML	â	You would then ne

double-check that the user who received this notification is not in the 'Development' role.

Last modified on 29 July 2024 by Veronica Kim

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